

nielsen

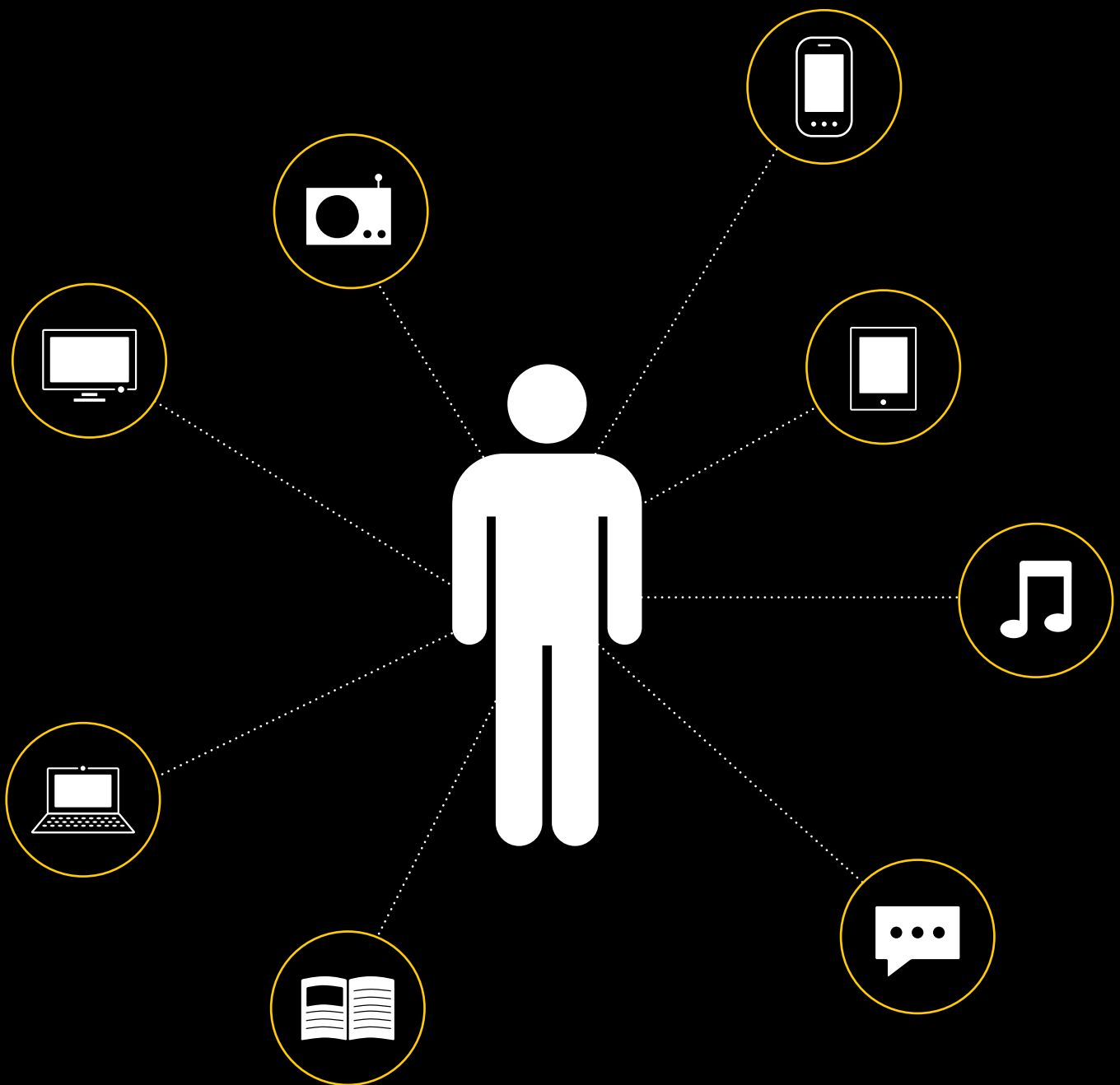
AN UNCOMMON SENSE  
OF THE CONSUMER™

# MEDIA TRENDS 2016

**HOW NEW ZEALANDERS CONSUME  
NEWSPAPERS, MAGAZINES, TV, RADIO  
& DIGITAL CONTENT**



MORE **CONNECTED**  
MORE **CONTENT**  
MORE **CONTROL**



# EXECUTIVE SUMMARY

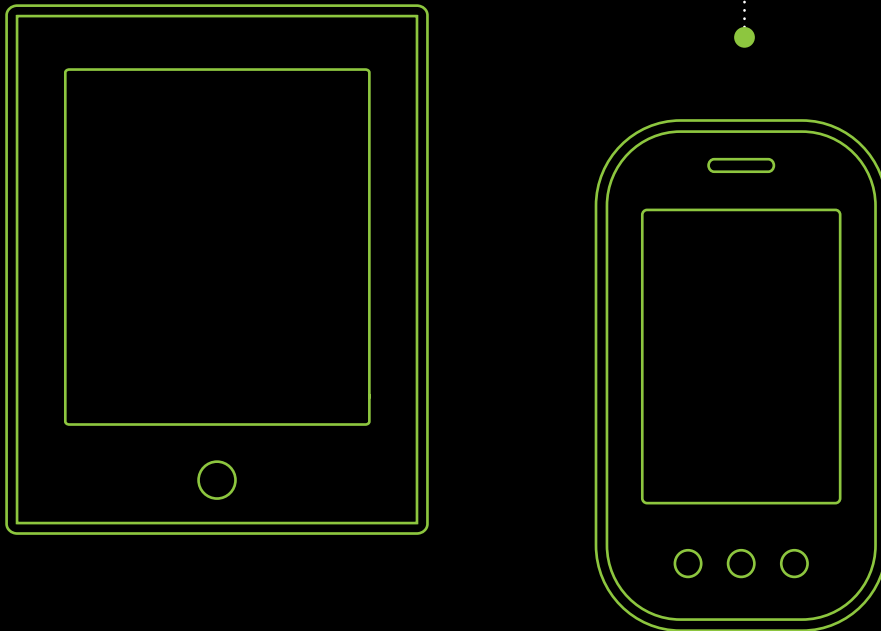
New Zealanders are more mobile and connected than ever before – we're accessing content wherever we go. This looks set to continue as mobile device ownership hasn't yet reached saturation point. Additional devices can complement traditional media and deepen audience engagement e.g. multi-screening while watching TV. Over half of us (56%) access the internet on our phones. Photography and Camera apps are now ahead of Utilities (e.g. alarm clock, calculator) with Social Media taking out the third spot.

We are certainly in a fragmented media market. Understanding which media and what combination of media audiences are consuming is indispensable. 6 out of 10 New Zealanders read news content online and it's growing. Audiences spend almost three hours a day watching broadcast TV, those watching only online TV content is 4%. The media mix has never been more important.

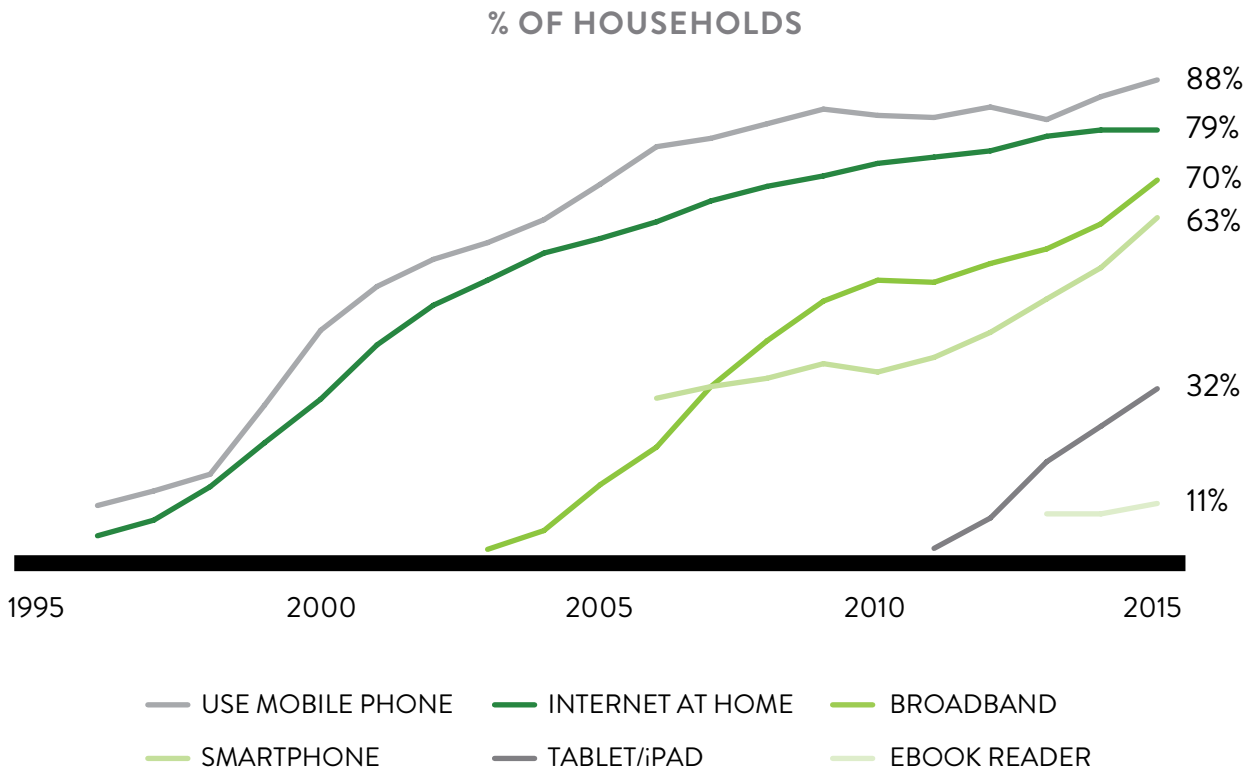
Some control is shifting to the consumer, as more people sign up for specialist digital subscription services, and consume content at a time that suits them. Nearly a quarter of New Zealanders subscribe to digital content such as Netflix and Spotify. But the key continues to be that the content is compelling – audiences will then watch it using whatever device, and this is true for advertising as well.

# 3.1 MILLION

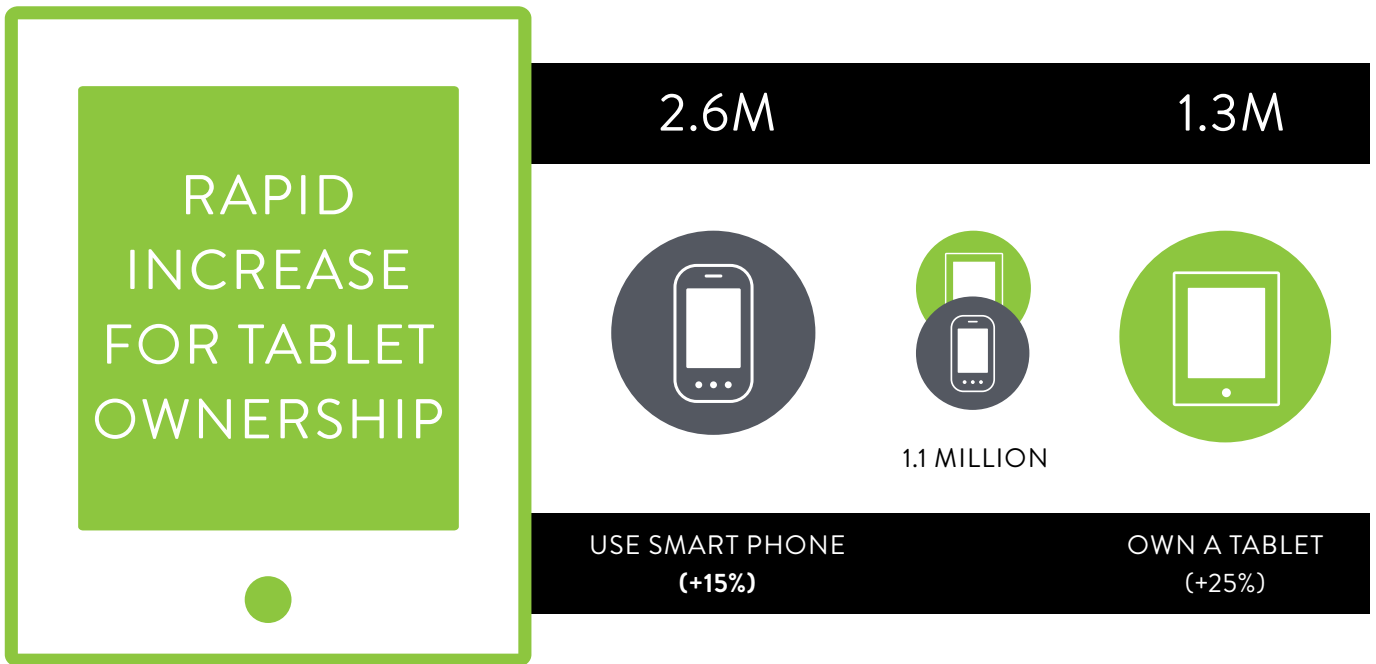
**NEW ZEALANDERS AGED 10+  
PERSONALLY OWN A MOBILE DEVICE**



## MORE CONNECTED AND MOBILE

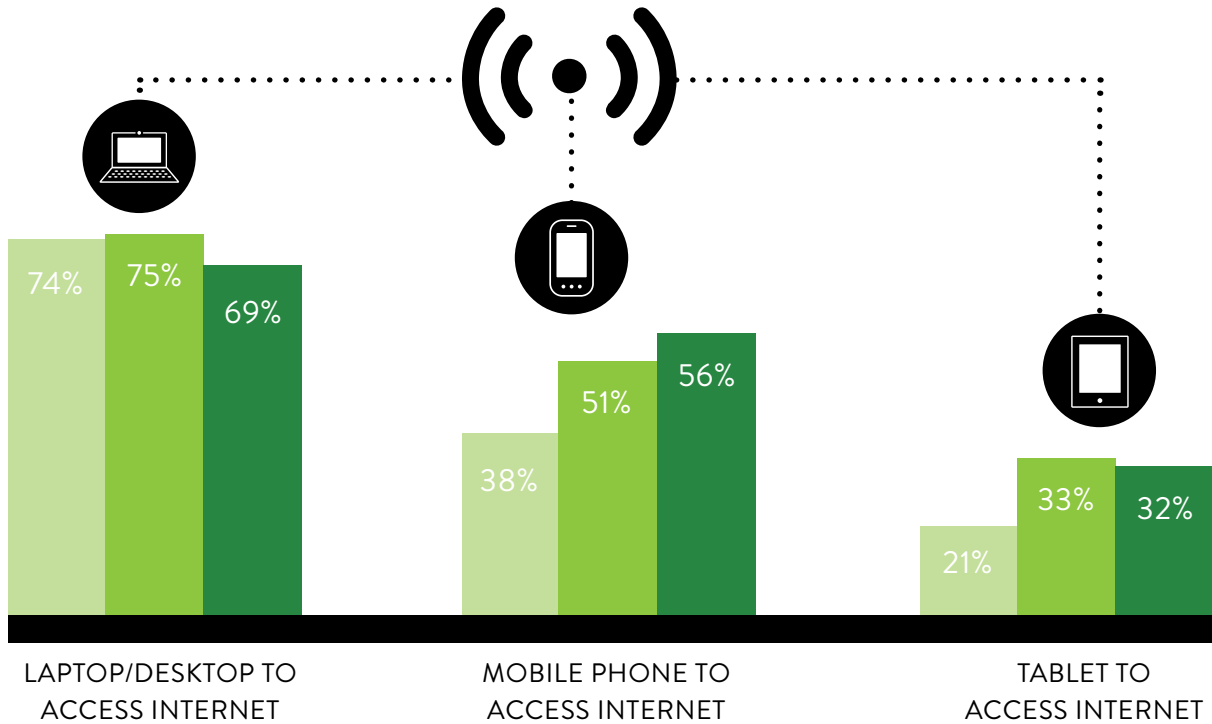


Base: Main Household Shopper (used as proxy for household)  
 Source: Nielsen Consumer and Media Insights – 1995 to 2015



Year on year  
 Base: All People 10+  
 Source: Nielsen Consumer and Media Insights Q1-Q4 2015

## MORE PEOPLE ARE ACCESSING THE INTERNET WITH SMARTPHONES



Base: All People 10+ who have used the Internet in the last 7 Days (3,423,000)  
 (Categories in this figure are not mutually exclusive: multiple answers)  
 Source: Nielsen Consumer and Media Insights Q1-Q4 2015-13

● 2013 ● 2014 ● 2015

## 64% OF NEW ZEALANDERS USE APPS REGULARLY

### OF THOSE WHO ACCESS THE INTERNET VIA A MOBILE DEVICE TOP 10 CATEGORIES



Source: Nielsen Consumer and Media Insights Q1-Q4 2015

# WE ARE GIVING UP OUR LANDLINES



## 43%

OF NEW ZEALANDERS  
HOMES NOW HAVE  
NO LANDLINE PHONE.  
THIS HAS INCREASED  
BY 24% YOY

## 20-29 YEAR OLDS

ARE ALMOST TWICE AS  
LIKELY TO ONLY HAVE  
A MOBILE PHONE



Base: All People 10+  
Source: Nielsen Consumer and Media Insights Q1-Q4 2015

# 2.8 MILLION

**NEW ZEALANDERS 15+ READ A  
NEWSPAPER EACH WEEK**

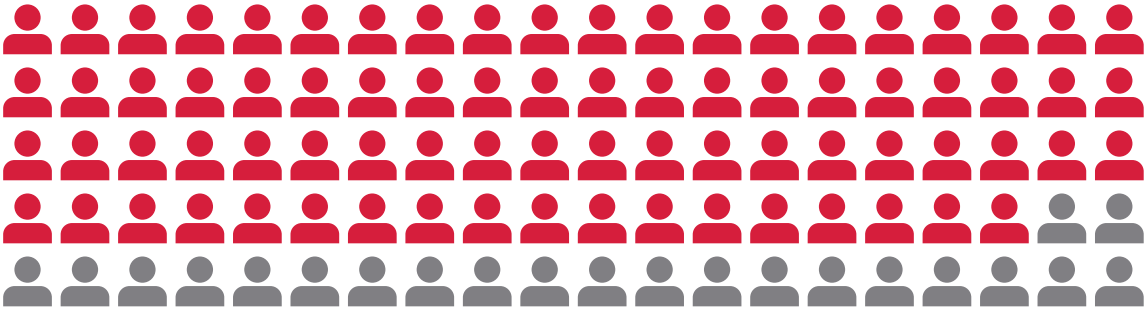


# NEWSPAPERS

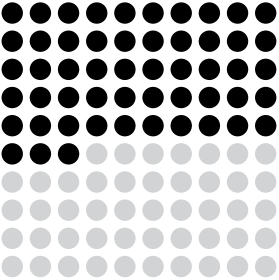




78% READ NEWSPAPERS  
ACROSS A WEEK

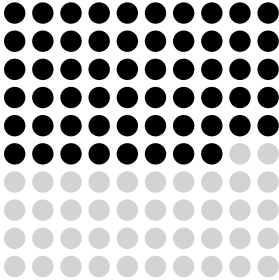


53%



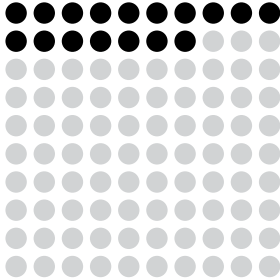
DAILY

58%



COMMUNITY

17%

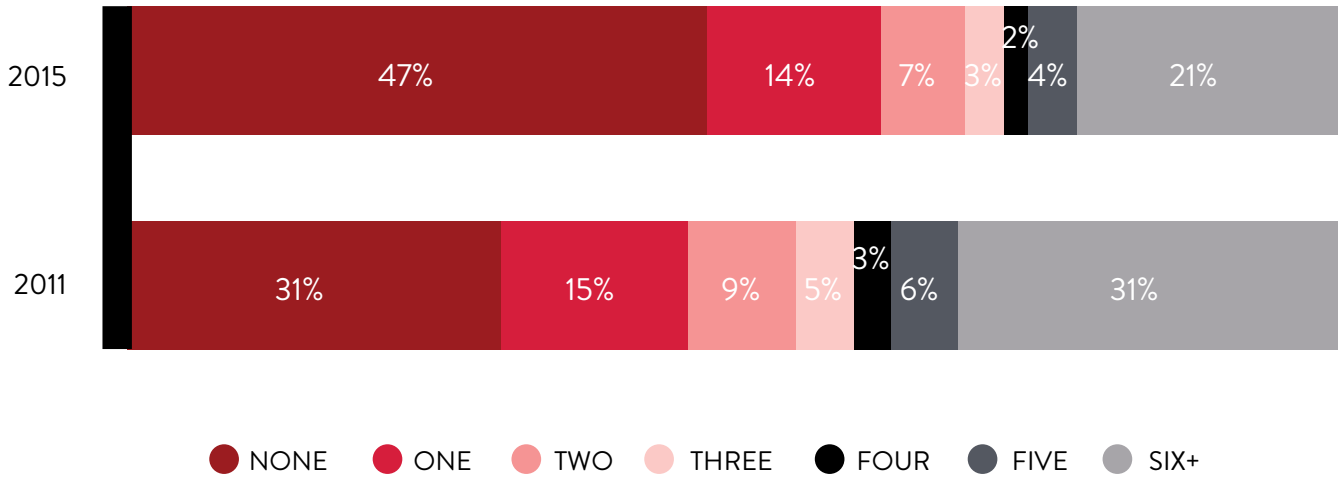


SUNDAY

Source: Nielsen Consumer and Media Insights Q1-Q4 2015. Base 15+

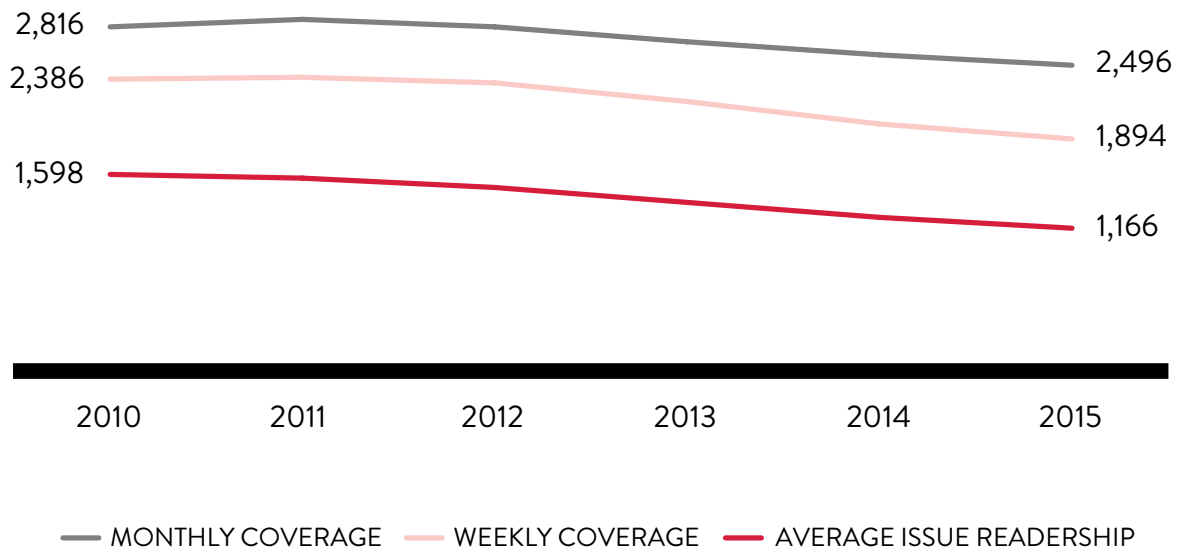
## FEWER PEOPLE ARE READING EVERY ISSUE

### NUMBER OF DAILY NEWSPAPER ISSUES READ PER WEEK



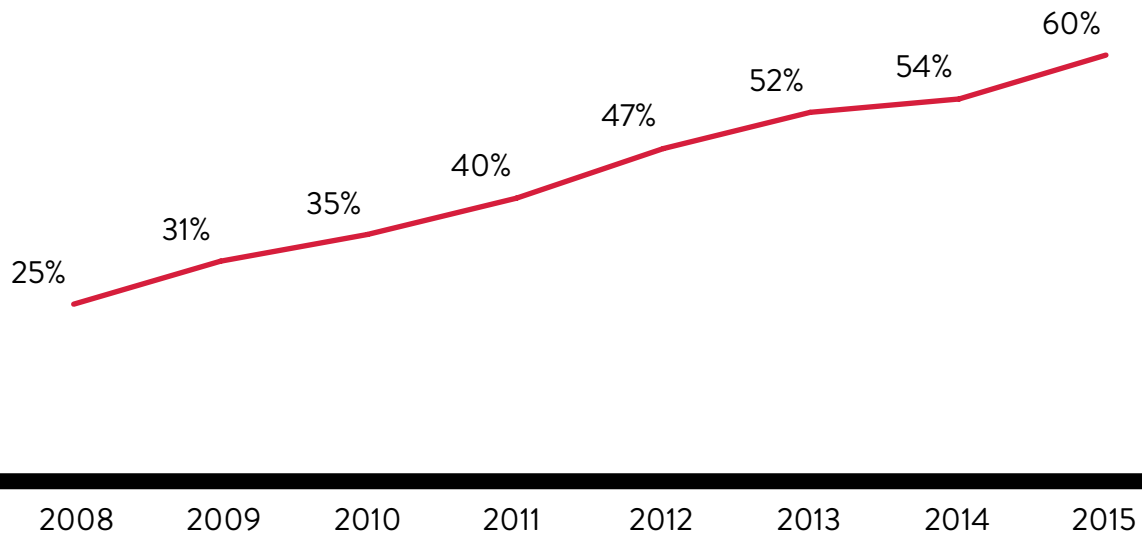
Base: All People 10+  
 Source: Nielsen Consumer and Media Insights Q1-Q4 2011 and 2015

### 2.5 MILLION READ DAILIES AT LEAST ONCE A MONTH



Base: All People 15+  
 Source: Nielsen Consumer and Media Insights Q1-Q4 2010-2015

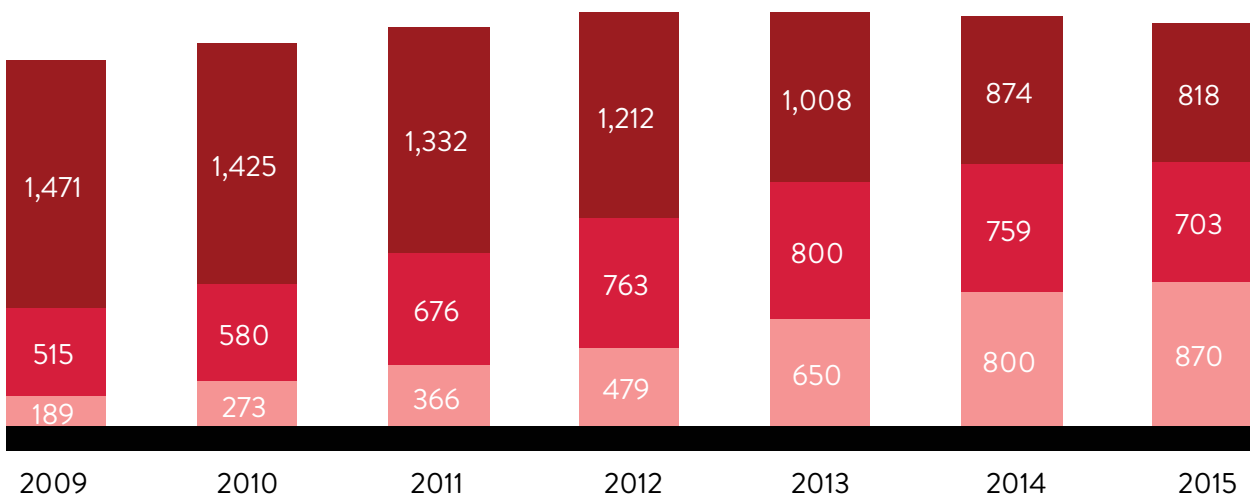
## 6 OUT OF 10 READ NEWS CONTENT ONLINE



Base: All People 10+  
Source: Nielsen Consumer and Media Insights Q1-Q4 2008-2015

## WEEKLY REACH REMAINS STEADY AT 2.4M PEOPLE

### DAILY NEWSPAPER BRANDS



● ONLINE ONLY ● BOTH PRINT & ONLINE ● PRINT ONLY

Print: Weekly reading of metropolitan newspapers (The New Zealand Herald, Dominion Press, The Press, Otago Daily Times, Waikato Times);  
Online: Weekly visits to nzherald.co.nz, stuff.co.nz, dompost.co.nz, odt.co.nz, the.press.co.nz, waikatotimes.co.nz

Base: All People 10+  
Source: Nielsen Consumer and Media Insights Q1-Q4 2009-15

# LOCAL NEWS IS POPULAR ONLINE



**2.6 MILLION** ACCESS  
DEDICATED NEWS AND  
CURRENT EVENT SITES

**2.4 MILLION** ACCESS  
LOCAL NZ NEWS\*

\*Combined NZ news brand URLs - based off 9 month average

Base: All People 2+

Source: Nielsen Online Ratings Feb 2015-Feb 2015

# 3 MILLION

**NEW ZEALANDERS READ AT LEAST ONE  
MAGAZINE IN ITS ISSUE PERIOD**



# MAGAZINES

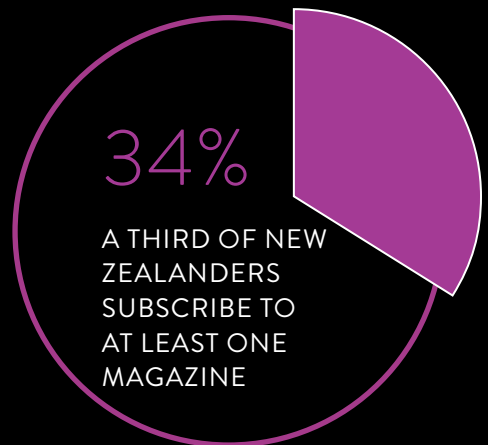
# TOP TITLES REACH 2,470,000 NEW ZEALANDERS

## TOP 10 CONSUMER MAGAZINES

Average issue readership  
 Base: All People 10+  
 Source: Nielsen Consumer and Media Insights Q1-Q4 2015

## MAGAZINE READERS SHOW LOYALTY



\*At least six months  
 Base: All People 10+  
 Source: Nielsen Consumer and Media Insights Q1-Q4 2015

## ENGAGEMENT LEVELS REMAIN HIGH



**53%** OF NEW ZEALANDERS  
ARE LOYAL TO THEIR  
FAVOURITE MAGAZINE\*



**44 MINUTES** IS THE AVERAGE  
TIME SPENT READING A  
TYPICAL MAGAZINE



PRIMARY READERS ARE  
SPENDING **74 MINUTES**

\*Read four out of four issues

Base: All People 10+

Source: Nielsen Consumer and Media Insights Q1-Q4 2012 & 2015

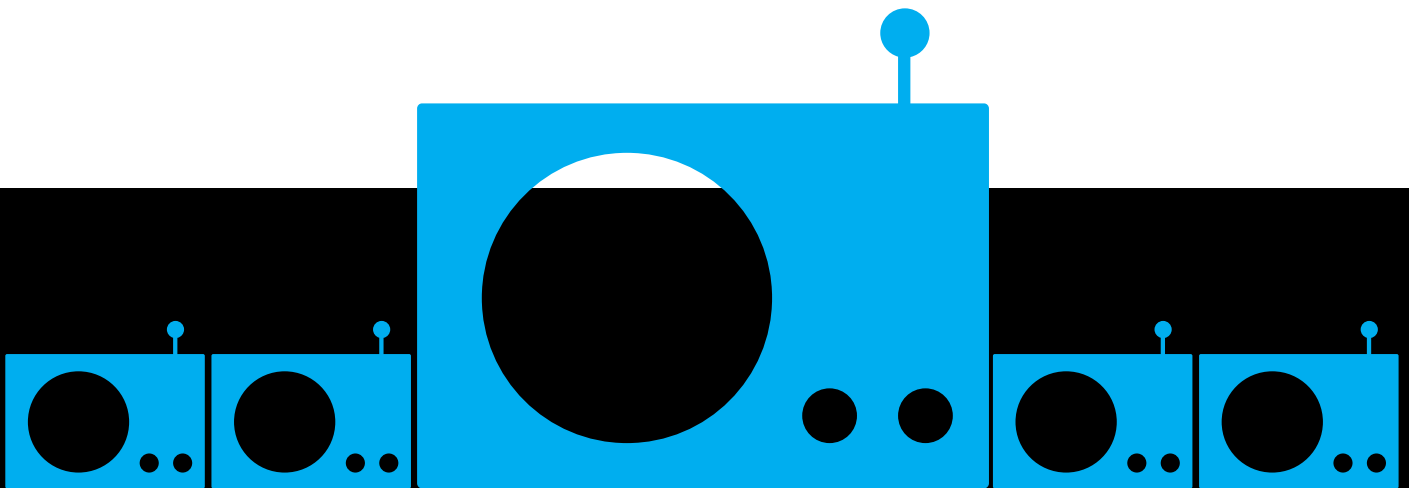


Base: All People 10+

Source: Nielsen Consumer and Media Insights Q1-Q4 2015

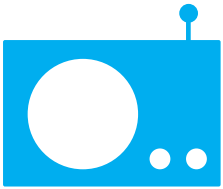
# 3.2 MILLION

**NEW ZEALANDERS AGED 10+ LISTEN  
TO RADIO EACH WEEK**



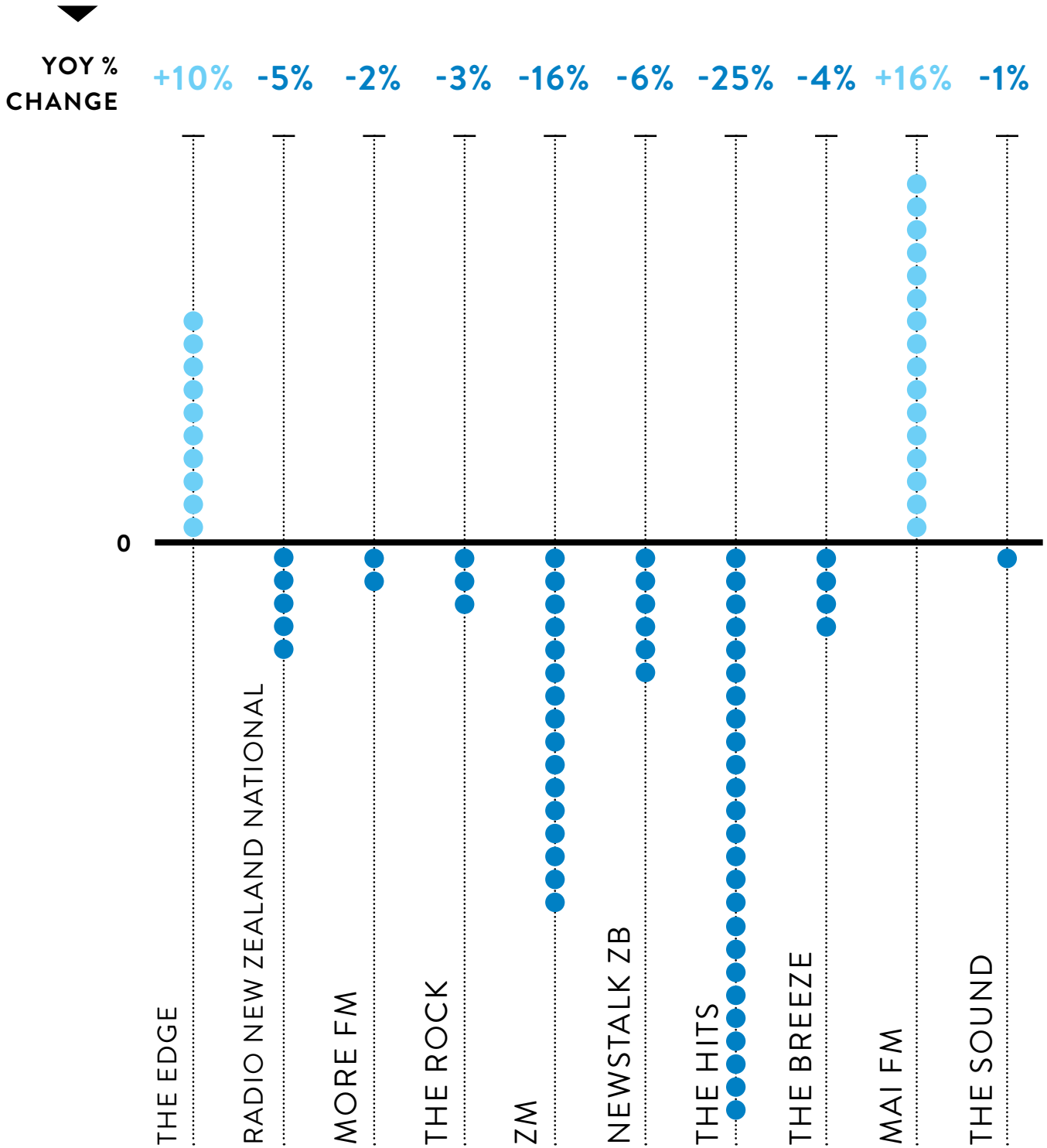
# RADIO





# TOP 10 RADIO STATIONS

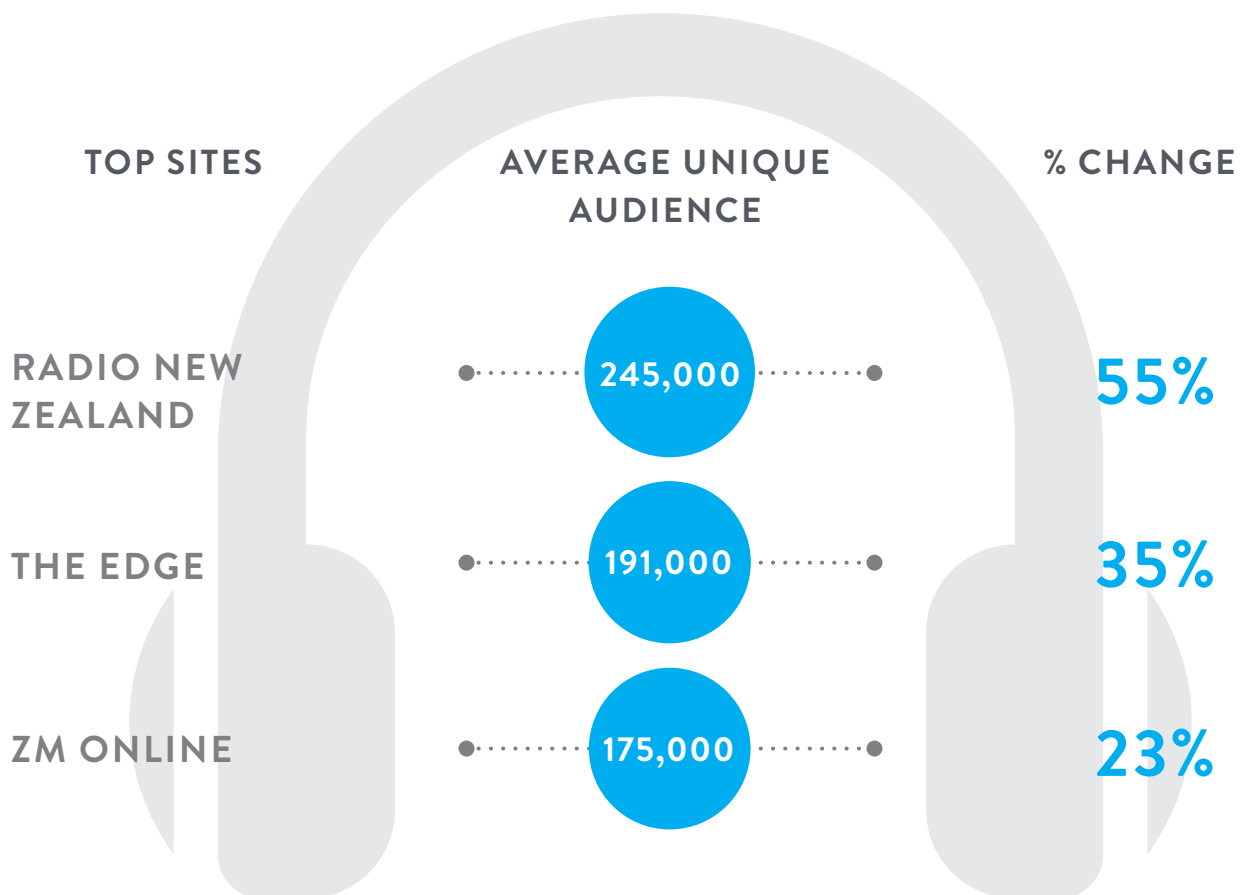
RANKED BY 2015 WEEKLY AUDIENCE (000S)



Base: All people 10+  
Source: Nielsen Consumer and Media Insights Q1 2014-Q4 2015

# RADIO ONLINE

CAPTURES  
A GROWING  
AUDIENCE



Source: Nielsen Online Ratings – Average Monthly Unique Audience 2014-2015  
Ranked by 2015  
Includes websites visitation; exclude mobile apps

# 3.5 MILLION

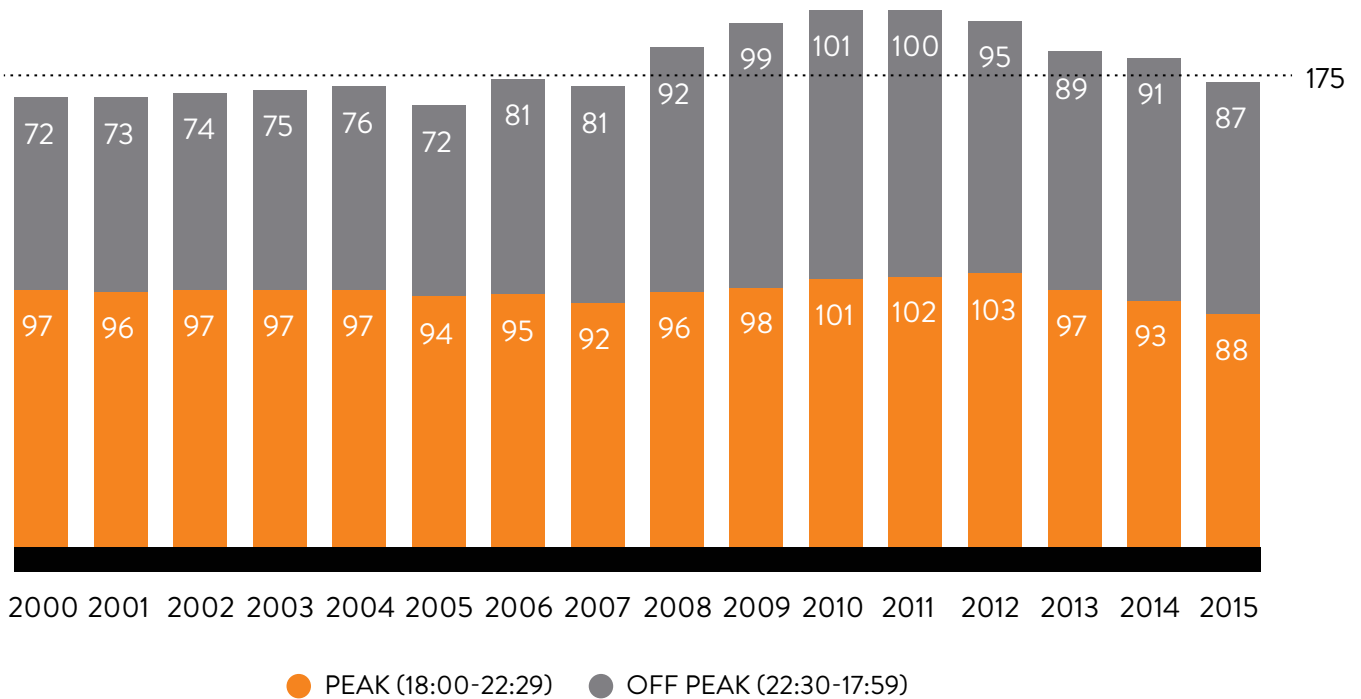
**NEW ZEALANDERS AGED 5+ WATCH  
TELEVISION EACH WEEK**



# TELEVISION



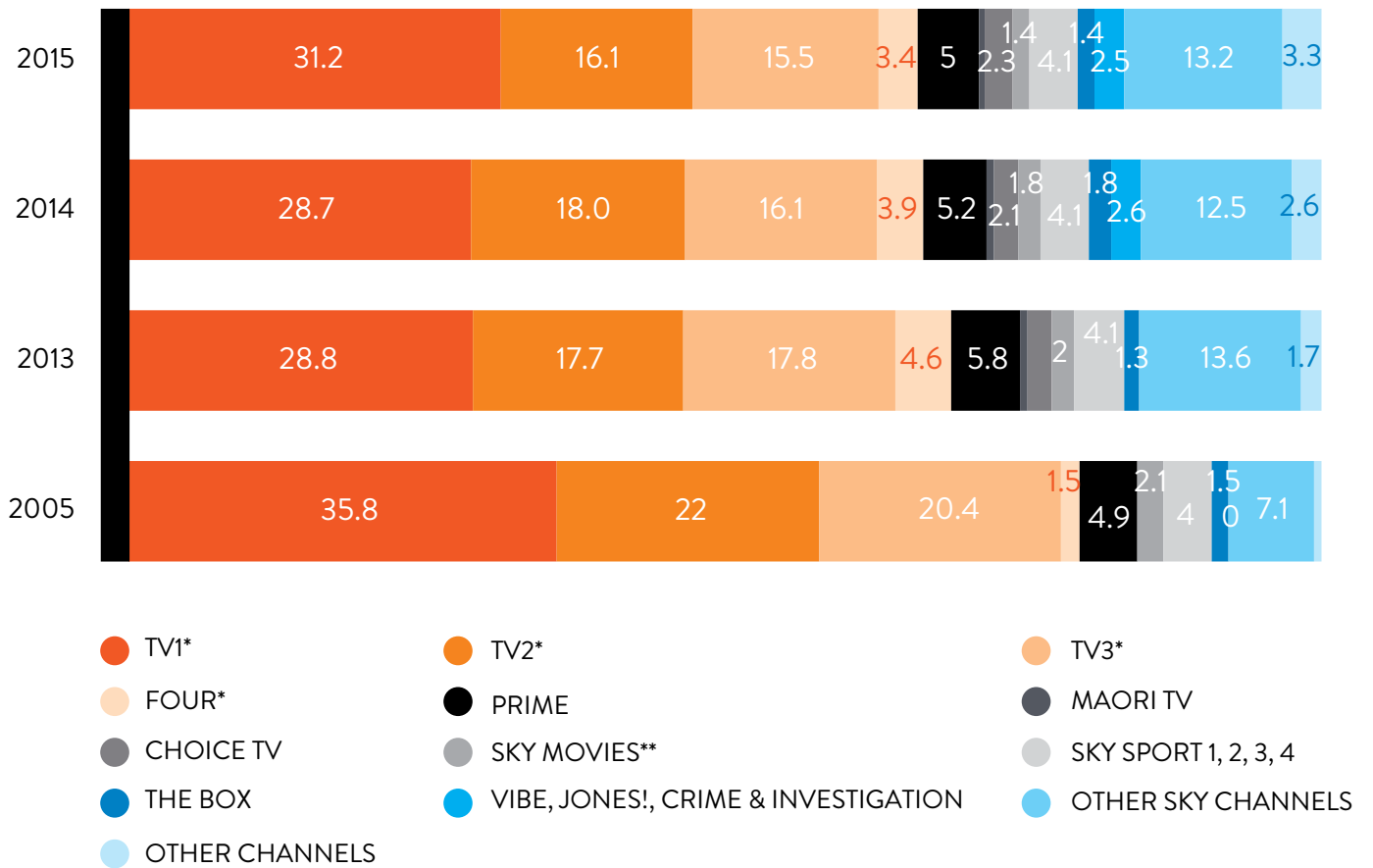
**AUDIENCES SPEND ALMOST 3 HOURS A DAY WATCHING BROADCAST TV**



Broadcast TV-Average Time Spent Viewing per Day (Mins)  
 All People 5+  
 Period: 1 January to 31 December 2015 (2am-2am)



PEAK CHANNEL SHARE



All People 5+, 1 January to 31 December 2015, Peak (6pm to 10:30pm)  
 TVOne\*, TV2\*, TV3\*, FOUR\* = Parent channel + Plus 1 Channel  
 Sky Movies\*\* = Includes Sky Movies Premiere, Extra and Greats



## TOP 10 PROGRAMMES IN 2015

RANK	PROGRAMME	CHANNEL	AUD%	EPISODES
1	ONE NEWS	TVONE*	16.1	365
2	RUGBY WORLD CUP 2015 FINAL LIVE	PRIME	16.0	1
3	BORDER PATROL	TVONE*	15.3	9
4	FAIR GO AD AWARDS 2015	TVONE*	14.9	1
5	FAIR GO	TVONE*	14.8	38
6	MRS. BROWN'S BOYS	TVONE*	14.6	2
7	SECRET LIFE OF CATS	TVONE*	14.0	1
8	HYUNDAI COUNTRY CALENDAR	TVONE*	13.9	30
9	INTL RUGBY BLEDISLOE CUP	SKY SPORT 1	13.8	1
10	THE FORCE	TVONE*	13.7	20

**TOP INDIVIDUAL PROGRAMME: ONE NEWS, TVONE\* 20<sup>TH</sup> JULY, AUD 20.8%**

Target: All People 5+  
Average combined episodes - 1 January to 31 December; 2am-2am  
TVOne\* = TVOne and TVOne Plus 1



## TOP 10 TIME-SHIFTED PROGRAMMES

RANK	PROGRAMME	CHANNEL	AUD%	EPISODES
1	BROADCHURCH	TVONE*	2.0	8
2	DESPICABLE ME 2	TV3*	2.0	1
3	DR SEUSS' THE LORAX	TV3*	1.8	1
4	MRS. BROWN'S BOYS	TVONE*	1.7	2
5	OUR GIRL	TVONE*	1.7	7
6	ADELE LIVE IN LONDON	TV3*	1.6	1
7	800 WORDS	TVONE*	1.6	7
8	WINTER	TVONE*	1.6	6
9	HOW TO MURDER YOUR WIFE	TVONE*	1.5	1
10	DOWNTON ABBEY	PRIME	1.4	10

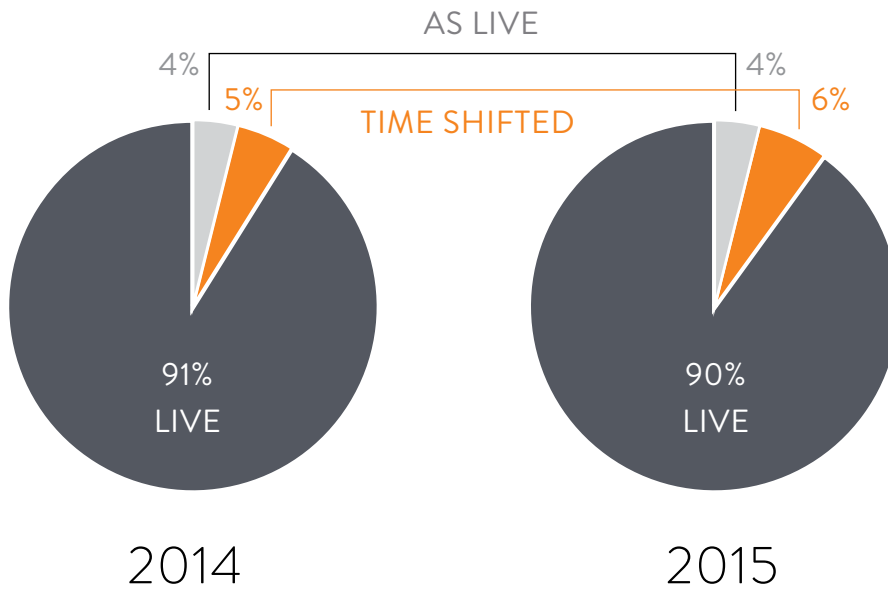
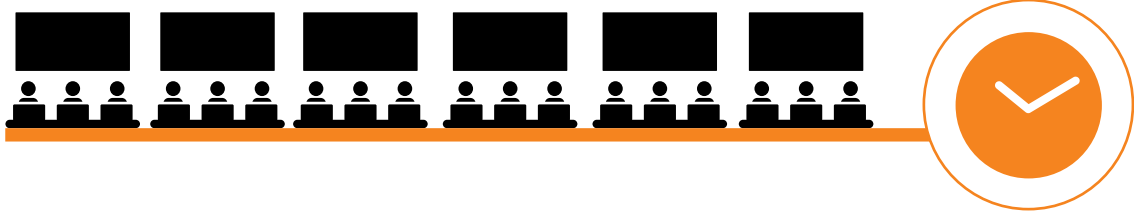
Target: All People 5+

Average combined episodes - 1 January to 31 December 2015; 2am-2am

TVOne\*, TV2\* and TV3\* = Parent channel + Plus 1 Channel

## SLIGHT INCREASE IN ALL DAY TIME-SHIFTED VIEWING

DRIVEN BY BOTH THE NUMBER OF PEOPLE AND THE TIME SPENT VIEWING CONTENT



HHS PENETRATION OF PVR 48%

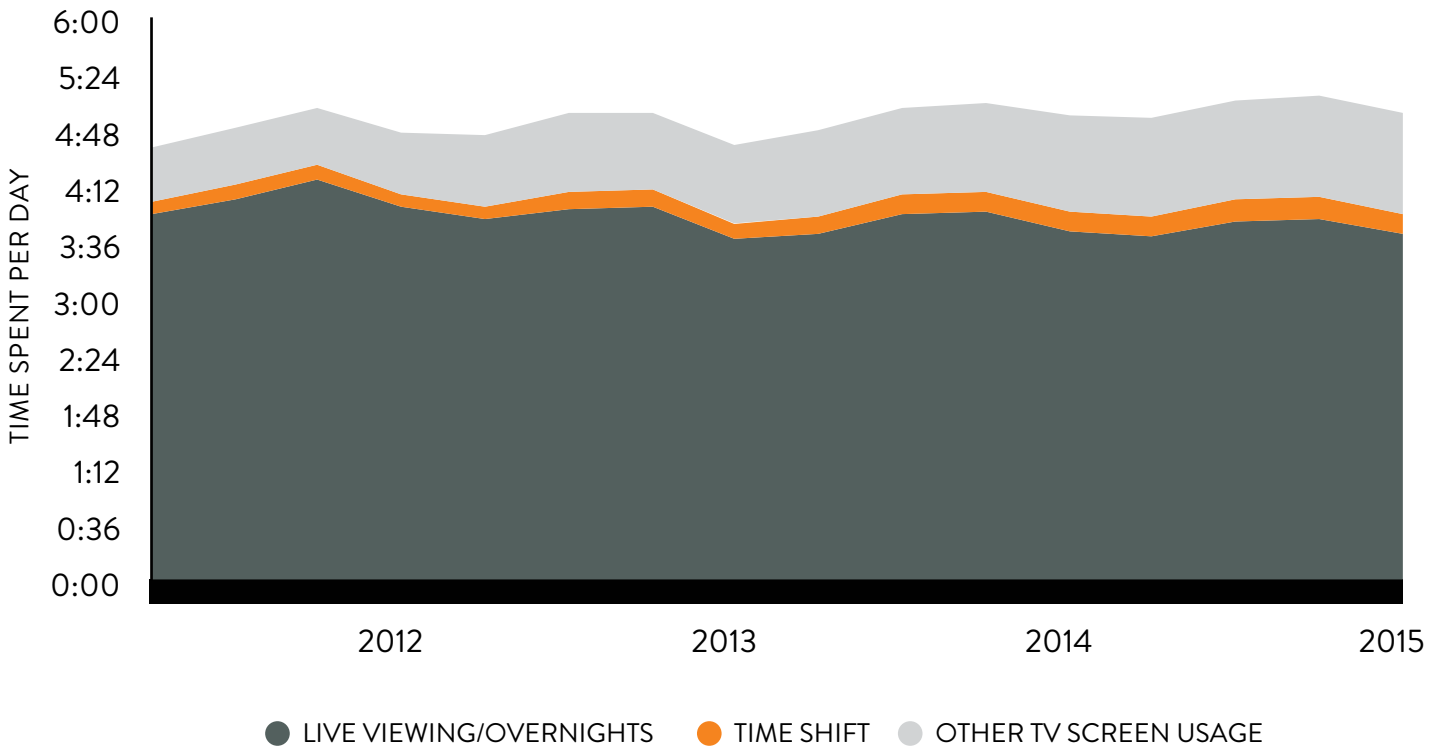


HHS PENETRATION OF PVR 51%

Total Television, AP5+  
Period: 1 January to 31 December 2014



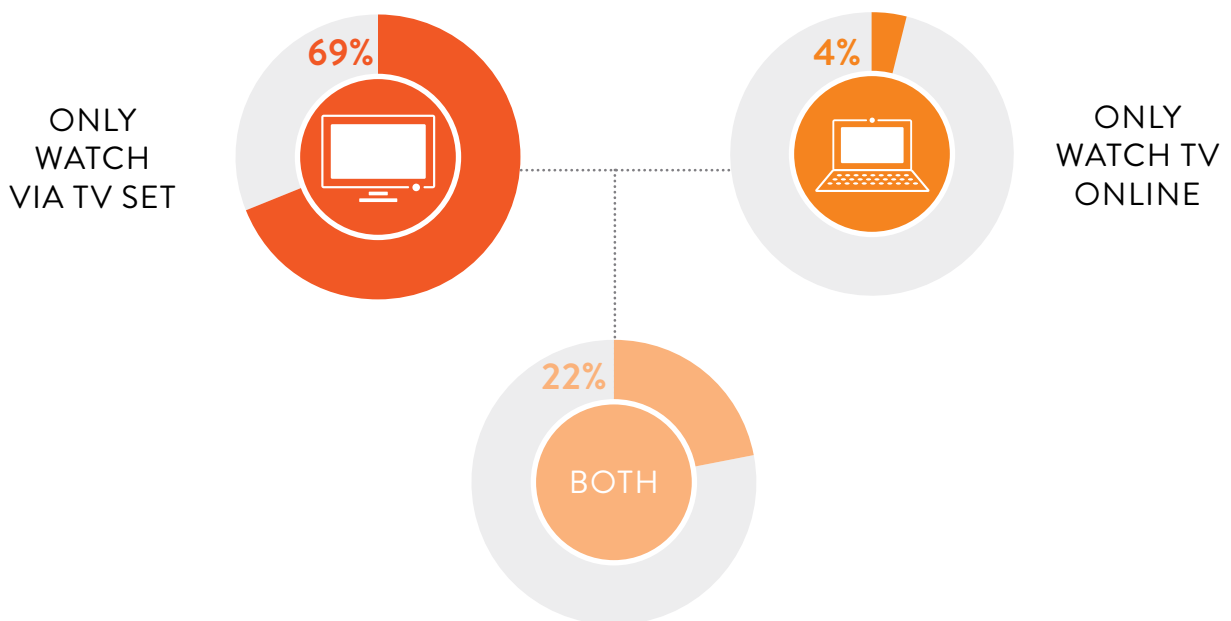
## TV SCREEN USE IS BECOMING MORE DIVERSE



Base: New Zealanders 5+ that watch TV in an average day

Source: Multi Screen Report 2015; Nielsen Television Audience Measurement, All day audience rating – total people

## 3.7M NEW ZEALANDERS WATCH TV CONTENT ON ANY DEVICE



Base: All People 10+

TV Content: Includes broadcast TV, shows or movies downloaded or streamed from the Internet

Source: Multi Screen Report 2015; Nielsen Consumer Media Insights Q2-Q3 2014,

# 2.5 MILLION

**NEW ZEALANDERS HAVE SEEN OUT OF HOME ADVERTISING IN THE LAST 7 DAYS**



# OUT OF HOME ADVERTISING

## NON METRO VIEWING HAS INCREASED

60% METRO

40% NON-METRO

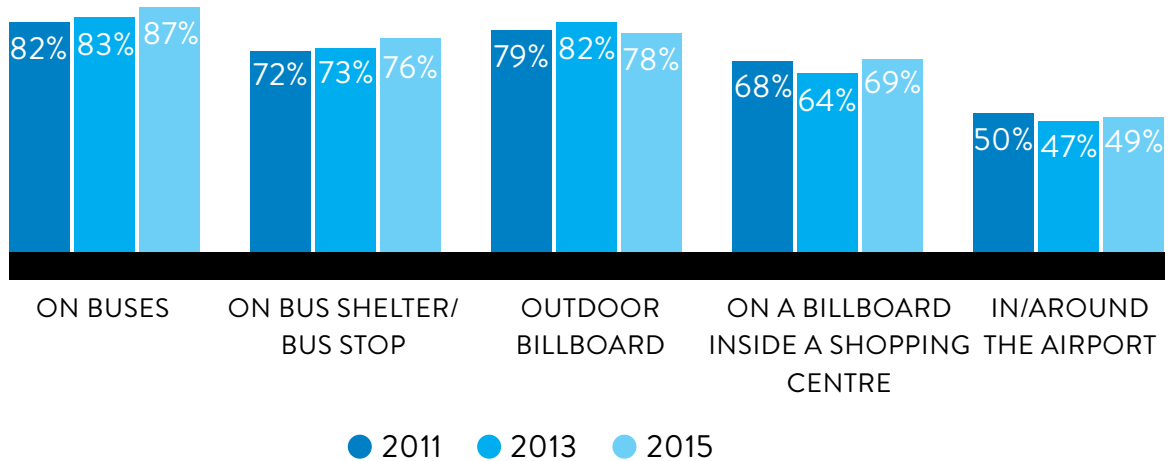


AUCKLAND, WELLINGTON, CHRISTCHURCH,  
DUNEDIN AND HAMILTON

Base: All people 15+  
Source: Nielsen Media CMI Q1 2015-Q4 2015

## BUSES & BUS SHELTERS ARE UP

### OUTDOOR ADVERTISING SEEN LAST 7 DAYS



Base: Seen outdoor advertising L7D 15+  
Source: Nielsen Media CMI Q1 2015-Q4 2015



Base: All people 15+  
Source: Nielsen Media CMI Q1 2015-Q4 2015

# 3.4 MILLION

**NEW ZEALANDERS USE THE  
INTERNET ACROSS A WEEK**



# INTERNET



## TOP 10 VISITED ONLINE BRANDS

- 1 GOOGLE (1)
- 2 FACEBOOK (2)
- 3 MSN (4) ▲
- 4 STUFF.CO.NZ (8) ▲
- 5 TRADE ME (5)
- 6 YOUTUBE (3) ▼
- 7 MICROSOFT (7)
- 8 NZ GOVERNMENT (9) ▲
- 9 NZ HERALD (NEW)
- 10 YAHOO! (6) ▼

Base: All people 5+  
 Source: Nielsen Online Ratings – Average Monthly Unique Audience 2015  
 Previous year ranking shown in brackets

## TOP 20 GROWTH BRANDS (EXCLUDING APPS)

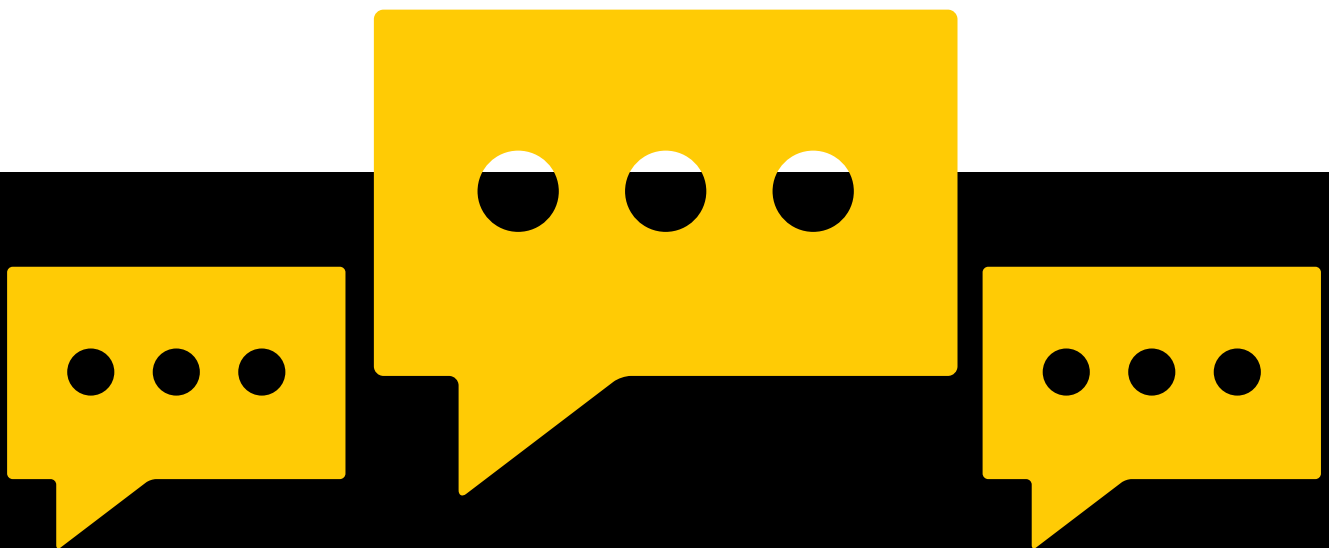
FOR SITES WITH A MONTHLY UNIQUE AUDIENCE GREATER THAN 300,000

- |                     |                        |                       |
|---------------------|------------------------|-----------------------|
| 1 ALIEXPRESS (102%) | 8 TRIPADVISOR          | 15 MITRE 10           |
| 2 SPOTIFY           | 9 STUFF.CO.NZ          | 16 WEB MD             |
| 3 MODE MEDIA        | 10 NZ TRANSPORT AGENCY | 17 PRICELINE          |
| 4 3 NEWS            | 11 INLAND REVENUE      | 18 NEW ZEALAND HERALD |
| 5 FARMERS           | 12 TVNZ                | 19 BUZZFEED           |
| 6 THE GUARDIAN      | 13 PAYPAL              | 20 KIWIBANK (8%)      |
| 7 HARVEY NORMAN     | 14 ZIFF DAVIS TECH     |                       |

Base: All people 5+  
 Source: Nielsen Online Ratings – Average Monthly Unique Audience across Jan-Dec 2014 & 2015  
 \*nzherald.co.nz mobile site correction was applied April 2014  
 \*based only on websites where 24 months of data is available

88%

OF ONLINE NEW ZEALANDERS VISIT  
SOCIAL MEDIA ACROSS A MONTH



SOCIAL MEDIA



75%  
FACEBOOK



61%  
YOUTUBE



23%  
GOOGLE+



20%  
LINKEDIN



20%  
INSTAGRAM



17%  
PRINTEREST



17%  
TWITTER



17%  
SNAPCHAT



12%  
WHATSAPP



11%  
NEIGHBOURLY

## FACEBOOK AND YOUTUBE CONTINUE TO DOMINATE THE SOCIAL MEDIA LANDSCAPE



Base: Online New Zealanders 15+  
Source: Nielsen Connected Consumer Survey 2015  
\*In a month, including apps.

# 1 IN 4

**ONLINE NEW ZEALANDERS SUBSCRIBE  
TO DIGITAL CONTENT**

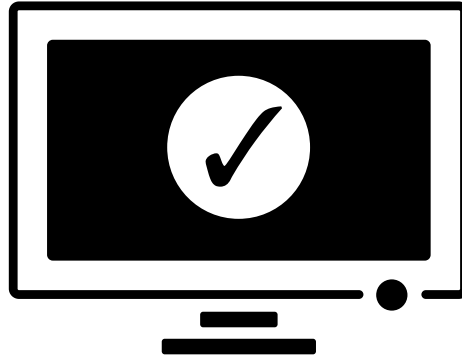


# DIGITAL CONTENT



TYPE OF SERVICES USED FOR INTERNET TV

WHICH TYPES OF TELEVISION CONTENT WATCHED ONLINE IN A 4 WEEK PERIOD



33%

OFFICIAL FREE TV ON-DEMAND, 'CATCH UP TV' SERVICES OR STREAMED TV



19%

TV SNIPPETS OR ENTIRE SHOWS STREAMED ON YOUTUBE, VIMEO, VINE, ETC



17%

TV SHOWS/MOVIES DOWNLOADED OR STREAMED FROM UNOFFICIAL SOURCES, EXCLUDING YOUTUBE



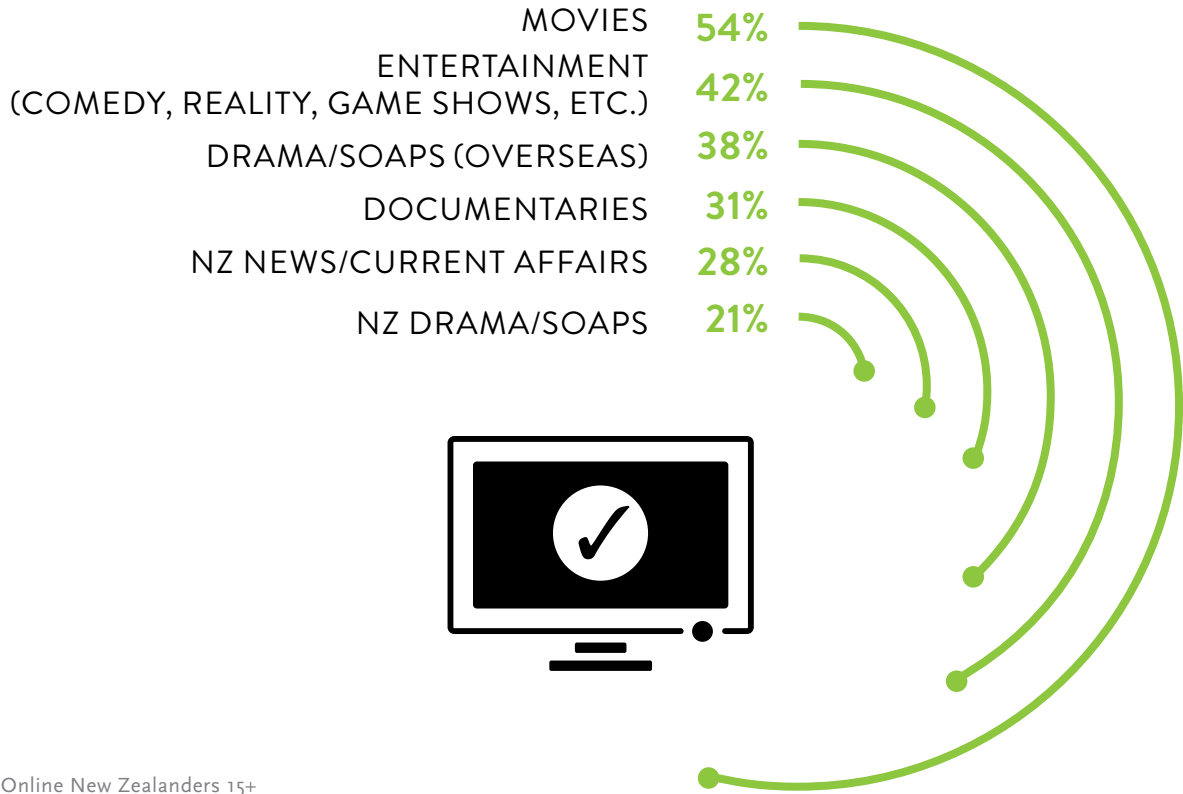
14%

SUBSCRIPTION BASED ON-DEMAND TV SERVICES (E.G. NETFLIX, LIGHTBOX)



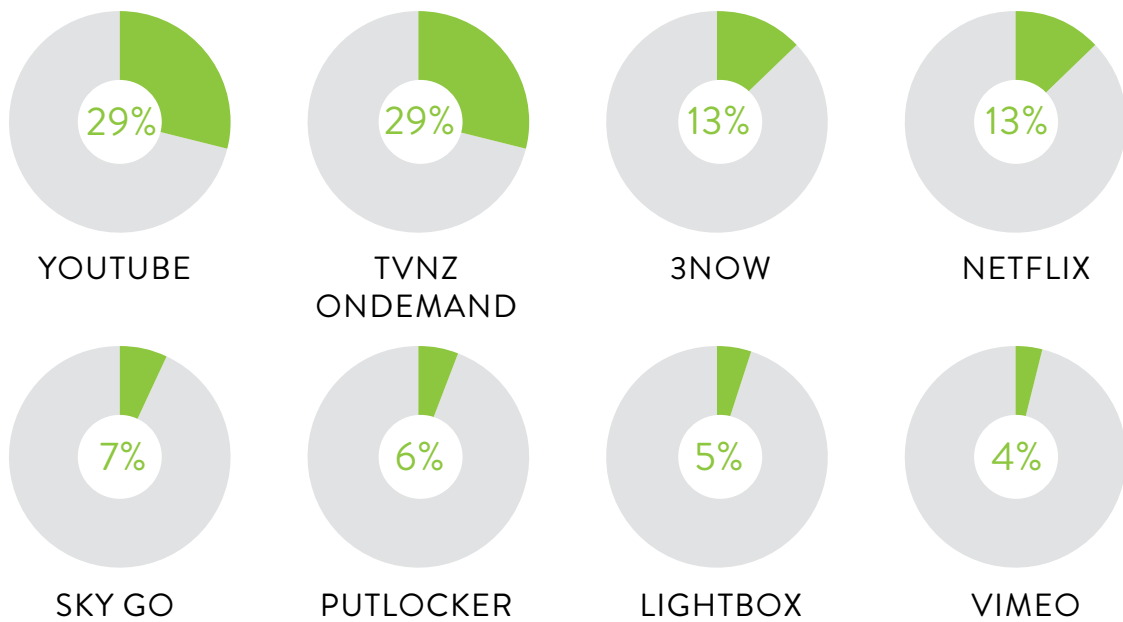
Base: Online New Zealanders 15+  
Source: Nielsen Connected Consumer Survey 2015

## TYPES OF PROGRAMMES WATCHED VIA INTERNET TV



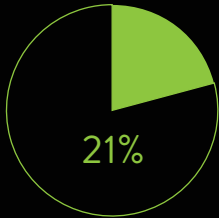
Base: Online New Zealanders 15+  
Source: Nielsen Connected Consumer Survey 2015

## YOUTUBE & TVNZ ON DEMAND VIE FOR TOP SPOT IN INTERNET TV VIEWING

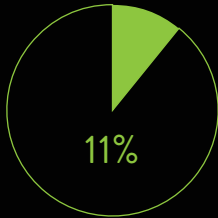


Internet TV services used last 4 weeks AP 15+  
Base: Online New Zealanders 15+  
Source: Nielsen Connected Consumer Survey 2015

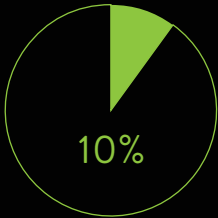
# SPOTIFY IS THE TOP CHOICE OF AUDIO CONTENT



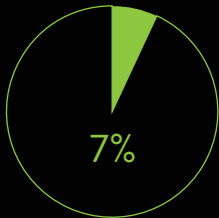
SPOTIFY



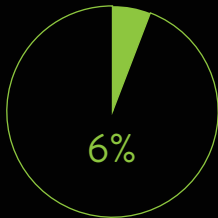
iHEART RADIO



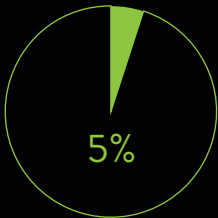
ONLINE RADIO (THEHITS.CO.NZ, MOREFM.CO.NZ ETC.)



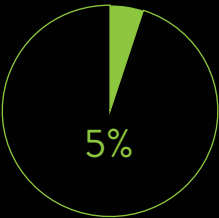
APPLE MUSIC



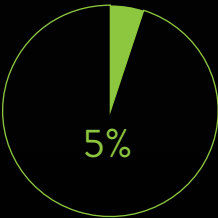
SOUNDCLOUD



GOOGLE PLAY MUSIC



iTUNES RADIO



PANDORA

Online Radio And/or Music Services Listened To In Last 4 Weeks  
 Base: Online New Zealanders 15+  
 Source: Nielsen Connected Consumer Survey 2015

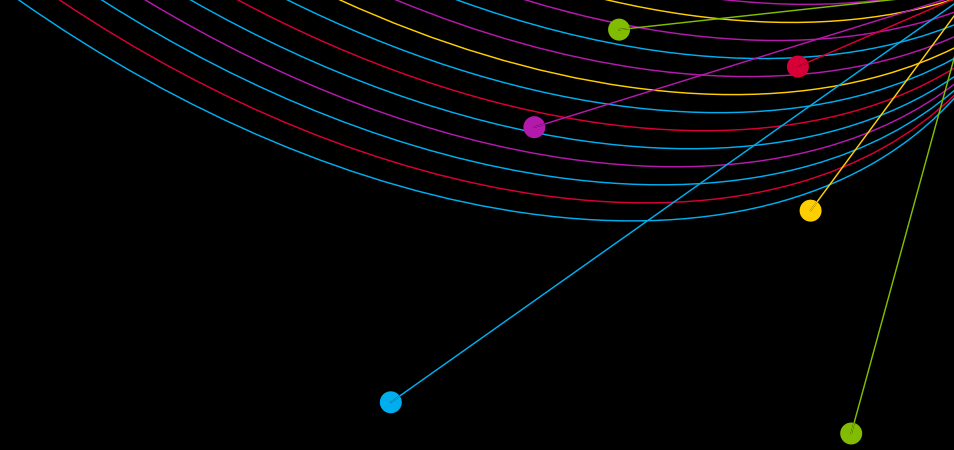


## ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world's population.

For more information, visit [www.nielsen.com](http://www.nielsen.com).

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